

Grand List State Payments to Municipalities: Suppressing Payment Data

Due to a December 2011 court ruling, municipal officials may not allow the public access to any data that displays a person's State Payment. NEMRC's Grand List software allows end users to accommodate that court ruling in all your grand list entities.

What's in this Guide

This guide explains how to hide state payments as required by law, including:

- How to hide state payments from tax bills and the tax book
- How to set up passwords to restrict access for users of your public access terminals

Vocabulary

Total Tax--The tax due before any State Payment amounts are deducted. Total Tax is the product of: grand list value x (all tax rates + late filer penalty)

Net Tax--The tax due after State Payment amounts are deducted

Net Tax Payments--The Net Tax divided by the number of installments on your town's tax bills

If you have questions, please contact PVR at
(802) 828-5860

or email tax.pvr@vermont.gov

For help with NEMRC software
call 1-900-387-1110

or email support@nemrc.com

Tax Book Options

Option 1: Print and reprint tax books to hide state payment data

Open the **As-Billed Grand List** (not shown). Go to the **Reports** menu and select **#5 Tax Book**. The option to hide the state payment information has always been available. Two options are circled in **Figure 1a**: **Print State Payment Amount**, and **Print Net Tax Payments**. When both are left unchecked the program will NOT display the State Payment amount or the Net Tax Payment amounts.

In **Figure 1b**, the State Payment and the Net Tax Payment that would normally show in the areas circled are now hidden. **It is very important to uncheck both boxes if you are printing this tax book for the public to view.** If you only check one of the boxes, whoever views the report could figure out someone's state payment in one of two ways:

- The State Payment would display.
- Net Tax Payments would display, enabling someone to get the State Payment by subtracting it from the Total Tax.

Fig. 1a

Tax Book Report Options - General

Print (Choose 3): Location A, TaxMap, Location B, PropDesc, Location C, 911 Data

Print On: Print as if Prior to 09/02, Print from "As Billed/Freeze" file.

Parcel Selection: Start with: XX999 - SMITH JOHN

Print State Payment Amount Print Net Tax Payments

Fig. 1b

Anytown 2011As Billed Grand List
Tax Book Report
By Name Main District

TAXABLE VALUATIONS	TAXES	PAYMENT WORK AREA
SMITH JOHN	MISTU Filed	
10 MAIN STREET	REAL 178,700	
ANYTOWN VT 05555	HOUSERSIDE ED 1,999.30	
	LOCAL AGREEMN 1.97	
	CITY 1,679.78	
	TOTAL TAX	3,681.05
	MISCELLANEOUS FEE	10.00
	TOTAL TAX	3,691.05
	GRAND LIST 1,787.00	
	HOUSERSIDE 178,700.00	
	ED HOUSERSITE TAX	1,681.75
	SPAN: 123-555-55555	
	ED HOUSERSITE TAX	1,999.30
	XX999- RL T TOTAL ACRES	0.13
	TOTAL ACRES	0.13
	TOT HOUSE TAX	3,681.05

Option 2: Reprinting Tax Books to show State Payment information

To reprint a copy of the Tax Book for office use only, select **State Payment Amount** and/or **Net Tax Payments**.

Fig. 2a

Tax Book Report Options - General

Print (Choose 3): Location A, TaxMap, Location B, PropDesc, Location C, 911 Data

Print On: Print as if Prior to 09/02, Print from "As Billed/Freeze" file.

Parcel Selection: Start with: XX999 - SMITH JOHN

Print State Payment Amount Print Net Tax Payments

Fig. 2b

Anytown 2011As Billed Grand List
Tax Book Report
By Name Main District

TAXABLE VALUATIONS	TAXES	PAYMENT WORK AREA
SMITH JOHN	MISTU Filed	
10 MAIN STREET	REAL 178,700	
ANYTOWN VT 05555	HOUSERSIDE ED 1,999.30	
	LOCAL AGREEMN 1.97	
	CITY 1,679.78	
	TOTAL TAX	3,681.05
	MISCELLANEOUS FEE	10.00
	TOTAL TAX	3,691.05
	GRAND LIST 1,787.00	
	HOUSERSIDE 178,700.00	
	ED HOUSERSITE TAX	1,681.75
	SPAN: 123-555-55555	
	ED HOUSERSITE TAX	1,999.30
	XX999- RL T TOTAL ACRES	0.13
	TOTAL ACRES	0.13
	TOT HOUSE TAX	3,681.05

Tax Bill Options

Option 1: Printing and reprinting tax bills to hide or show the state payment information

Open the **As-Billed Grand List** (not shown). Go to the **Reports** menu and select any of the tax bill report options: **Copy of, Adjusted / Revised,** or **Late Filers**. There is an option to hide the state payment from printing on the tax bill. See *Figure 3a*. This box defaults to show the State Payment, which avoids the inadvertent printing and mailing of all of a town's tax bills without the State Payment being displayed. Thus, it is very important that you spot check your tax bills before mailing them to ensure everything is printing properly. *Figure 3b* shows you that the tax bill will print normally, displaying the State Payment, Net Tax and Net Tax Payments.

Adjusted/Revised Tax Bills Report Options

General

Real estate
 Personal
 Both

Print (Choose 2)

Location A
 Location B
 Location C

TaxMap
 PropDesc
 911 Data

Individual Range
 All parcels

Reprints

Order: Parcel #
 Owner

Print as if Prior to 09/02

Print On

Plain Paper
 Pre-Printed
 Custom

Parcel Selection

Start with: XX999 - SMITH JOHN

Vertical print adjustment 1/10000 inch (ex: 5000 = 1/2 inch) negatives allowed

Horizontal print adjustment 1/10000 inch (ex: 5000 = 1/2 inch) negatives allowed

Include misc fees in house site tax? (Some parcels do not have this rate.)
 Print State Payment Amount

Print default bill backer

Fig. 3b

PAYABLE TO: ANYTOWN
MAIL TO: 1 MAIN STREET
ANYTOWN VT 05555

TAX BILL

PARCEL ID: XX999- BILL DATE: 01/11/2012 TAX YEAR: 2011

Location: 10 MAIN STREET
OWNER: SMITH JOHN
10 MAIN STREET
ANYTOWN VT 05555

HOUSE SITE TAX INFORMATION

SEAN #	SCL CODE: 246
TOTAL PARCEL ACRES	0.13
HOUSE SITE VALUE	178,700
HOUSE SITE EDUCATION TAX	1,999.30
HOUSE SITE MUNICIPAL TAX	1,681.75
HOUSE SITE TOTAL TAX	3,681.05
FOR INCOME TAX PURPOSES	

ASSESSED VALUE	HOUSE SITE
REAL 178,700	178,700
TOTAL TAXABLE VALUE 178,700	178,700
GRAND LIST VALUES 1,787.00	1,787.00

TAX RATE NAME	TAX RATE	TAX RATE * GRAND LIST = TAXES
City	0.0000	\$1,787.00 = 1,787.00
Local Agreement	0.0011	\$1,787.00 = 1.97
HOUSE SITE EDUCATION	1.1188	\$1,787.00 = 1999.30
Commercial Adj		10.00

Revised Bill

1st Payment	2nd Payment	3rd Payment	4th Payment	TOTAL TAX
08/15/2011	11/15/2011	02/15/2012	05/15/2012	1493.00
499.01	499.01	499.01	499.01	1497.00
				NET TAX DUE 1996.05

DETACH THE STUBS BELOW AND RETURN WITH YOUR PAYMENT

| ANYTOWN TAX YEAR 2011 |
|-----------------------|-----------------------|-----------------------|-----------------------|
| 1ST PAYMENT DUE | 2ND PAYMENT DUE | 3RD PAYMENT DUE | 4TH PAYMENT DUE |
| 08/15/2011 | 11/15/2011 | 02/15/2012 | 05/15/2012 |
| OWNER NAME | OWNER NAME | OWNER NAME | OWNER NAME |
| SMITH JOHN | SMITH JOHN | SMITH JOHN | SMITH JOHN |
| PARCEL ID | PARCEL ID | PARCEL ID | PARCEL ID |
| XX999- | XX999- | XX999- | XX999- |
| AMOUNT DUE | AMOUNT DUE | AMOUNT DUE | AMOUNT DUE |
| 499.01 | 499.01 | 499.01 | 499.01 |
| AMOUNT PAID | AMOUNT PAID | AMOUNT PAID | AMOUNT PAID |
| Revised Bill | Revised Bill | Revised Bill | Revised Bill |

Tax Bill Options, continued

Option 2: Printing and reprinting tax bills to hide the state payment information

To hide the State Payments on a tax bill, uncheck the check box **Print State Payment Amount** as seen in *Figure 4a*. The tax bill will now only show the Total Tax and not any State Payment information or Installment information. This will apply to all tax bills even if they do not have a State Payment applied to their parcel. This is so that no one can tell whether or not a State Payment has been applied to a tax bill. Refer to the tax bill shown in *Figure 4b*.

Adjusted/Revised Tax Bills Report Options

General

Real estate
 Personal
 Both

Parcel #
 Owner

Plain Paper
 Pre-Printed
 Custom

Print as if Prior to 09/02
 Reprints

Print (Choose 2)
 Location A
 Location B
 Location C
 TaxMap
 PropDesc
 911 Data

Individual Range
 All parcels

FoxPro Filter Expression: **New** **Edit** **Delete**

Parcel Selection: Start with: - **Find**
 Find

Vertical print adjustment 1/10000 inch (ex: 5000 = 1/2 inch) negatives allowed
 Horizontal print adjustment 1/10000 inch (ex: 5000 = 1/2 inch) negatives allowed
 Include misc fees in housesite tax? (Some parcels do not have this rate.)
 Print State Payment Amount Print default bill backer

TAX BILL

PAYABLE TO: **ANYTOWN**
 MAIL TO: **1 MAIN STREET**
ANYTOWN VT 05555

This is the only bill you will receive. Please forward to new owner if property is sold.

PARCEL ID: **XX999** BILL DATE: **01/11/2012** TAX YEAR: **2011**

Location: **10 MAIN STREET**
 OWNER: **SMITH JOHN**
10 MAIN STREET
ANYTOWN VT 05555

HOUSESITE TAX INFORMATION
 SPAN # **0.13** SCL CODE: **246**
 TOTAL PARCEL ACRES **0.13**
 HOUSESITE VALUE **178,700**
 HOUSESITE EDUCATION TAX **1,999.30**
 HOUSESITE MUNICIPAL TAX **1,681.75**
 HOUSESITE TOTAL TAX **3,681.05**
 FOR INCOME TAX PURPOSES

ASSESSED VALUE		HOUSESTEAD	
REAL	178,700	178,700	
TOTAL TAXABLE VALUE	178,700	178,700	
GRAND LIST VALUES	1,787.00	1,787.00	

TAX RATE NAME	TAX RATE	GRAND LIST	TAXES
City	0.9400	1,787.00	1679.78
Local Agreement	0.0011	1,787.00	1.95
HOUSESTEAD EDUCATION	1.1188	1,787.00	1999.30
Commercial Adj			10.00
TOTAL TAX STATE PAYMENTS			3491.03
NET TAX DUE			

1st Payment	2nd Payment	3rd Payment	4th Payment	TOTAL TAX STATE PAYMENTS
08/15/2011	11/15/2011	02/15/2012	05/15/2012	3491.03

REPAY THE BYEMS BELOW AND RETURN WITH YOUR PAYMENT

| ANYTOWN TAX YEAR 2011 |
|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| 1ST PAYMENT DUE
08/15/2011 | 2ND PAYMENT DUE
11/15/2011 | 3RD PAYMENT DUE
02/15/2012 | 4TH PAYMENT DUE
05/15/2012 |
| OWNER NAME
SMITH JOHN | OWNER NAME
SMITH JOHN | OWNER NAME
SMITH JOHN | OWNER NAME
SMITH JOHN |
| PARCEL ID
XX999- | PARCEL ID
XX999- | PARCEL ID
XX999- | PARCEL ID
XX999- |
| AMOUNT DUE | AMOUNT DUE | AMOUNT DUE | AMOUNT DUE |
| AMOUNT PAID | AMOUNT PAID | AMOUNT PAID | AMOUNT PAID |

Setting up Public Access Passwords

If you allow the public or unauthorized municipal officials access to look at your grand list program, you are required to restrict various areas of the program so they cannot access State Payment information. NEMRC has established all the areas that should be restricted. You should not be using any passwords you created before 2012.

Every As-Billed, Working, Lodged, or Reappraisal grand list allows public access **unless you restrict access.**

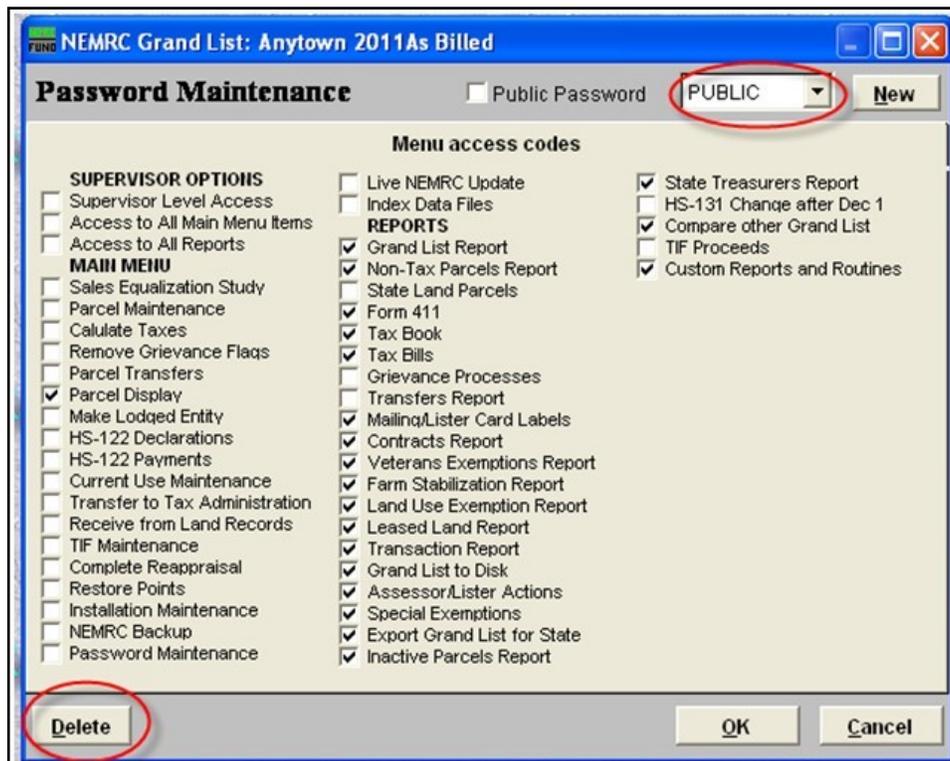
ACCESS MUST BE RESTRICTED FOR EACH GRAND LIST ENTITY INDIVIDUALLY.

To restrict access, follow the steps below for each of your grand list entities.

Open the Grand List program and select an entity. Once on the **Main Menu** (not shown) select '**P** **Password Maintenance**. Click the drop-down and select the password you assigned for the public to use for looking at the grand list. In *Figure 5* the password assigned is **Public**. Click on the **Delete** button in the lower left corner to remove this password.

Repeat this process for all passwords assigned to any unauthorized municipal officials who should not have access to State Payment information. When done, click **OK** to proceed to the next step.

Fig. 5

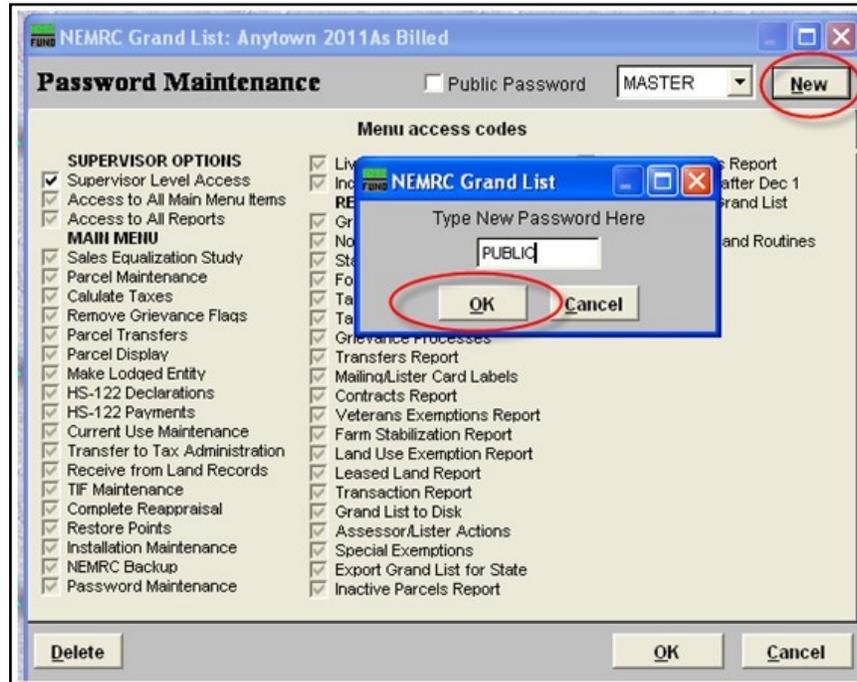


Setting up Public Access Passwords, continued

Setting up a new 'Public' access password for the public to use or for municipal officials that should not have access to State Payment Information.

Click on the **New** button and type a password in the space provided. Then press **OK**. You can use the same password that you deleted in the previous step. See *Figure 6*.

Fig. 6



In *Figure 7a*, there are no check marks in any of the **Menu access codes**. Now place a check in the box labeled **Public Password** at the left of your new password, as seen in *Figure 7b*. You will notice that certain **Menu access codes** are grayed out. These are areas of the program that pertain to the showing of State Payment information. It is up to you to select the remaining available areas of the program by placing a check in the box. Click **OK** when done.

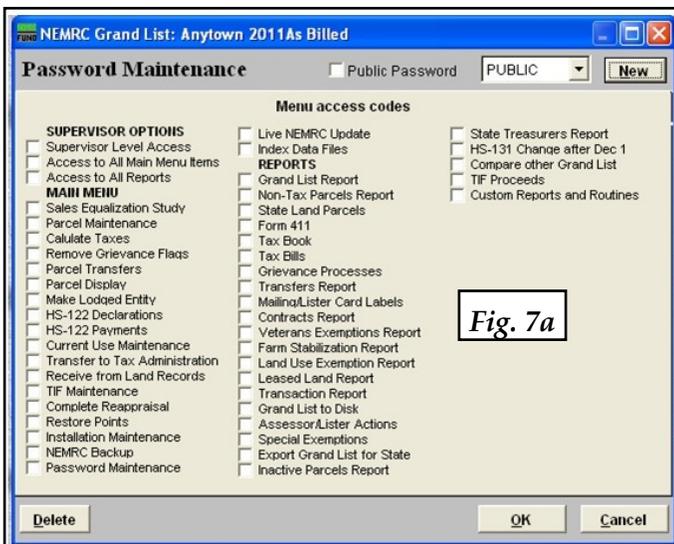


Fig. 7a

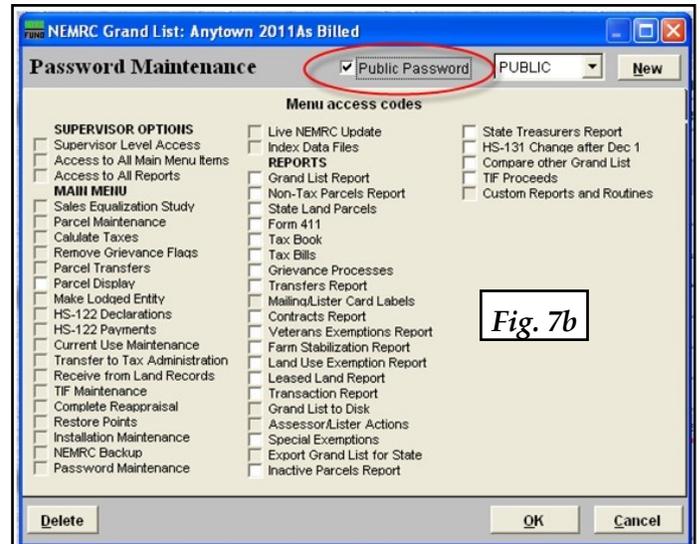


Fig. 7b

When placing a check in the available **Menu access codes**, you can allow the public to access the **Tax Bills** and **Tax Book**, because the ability to see the State Payment or Net Tax Payment information is turned off. Refer to the tax book illustration (*Figure 1*) and tax bill illustration (*Figure 3*) of this guide.

In **Parcel Maintenance** and **Parcel Display** the **Payment/Tax Data** tab is removed from that screen as well. *Figure 8* is an example of a public access password in which you can see the public has access to the following areas of the program:

Main Menu

- Parcel Display

Reports Menu

- Grand List
- Nontax Parcels
- State Land Parcels
- 411
- Tax book
- Tax bills
- Contracts
- Veterans’ Exemptions
- Farm Stabilizations
- Land Use Exemptions
- Leased Land
- Special Exemptions

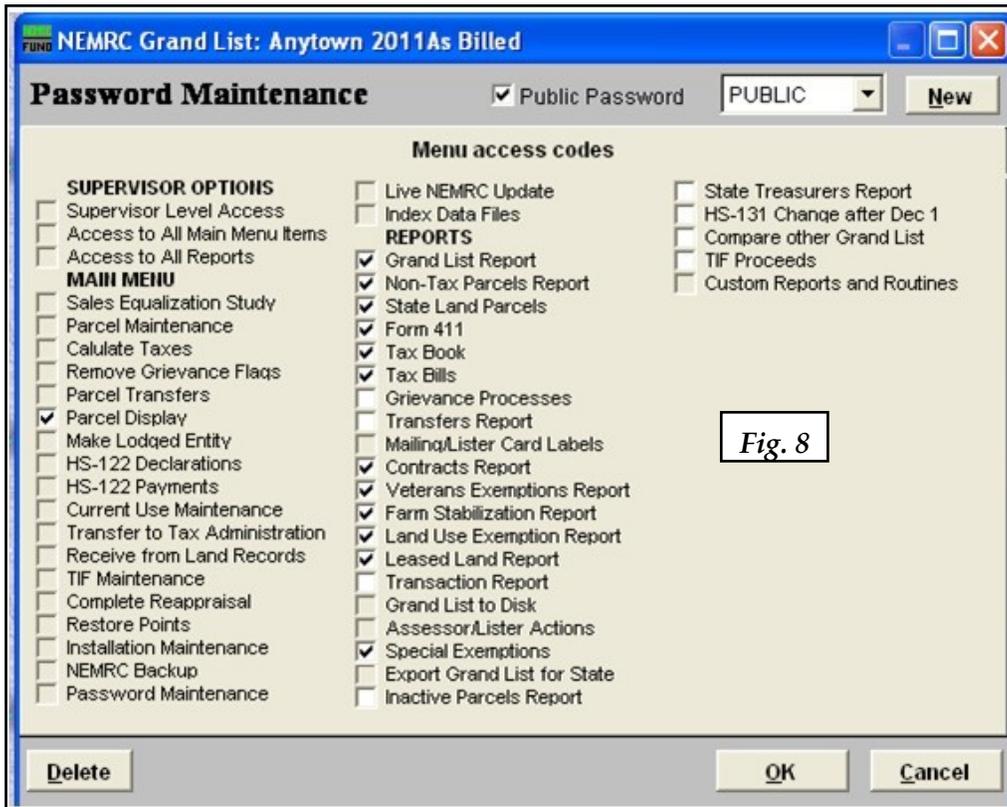


Fig. 8

Important note about exporting data

If you export data to various people using the **H Export data** feature in the grand list on the **Reports Menu** it is important that you **do not** export the Tax Payment 1, 2, 3, or 4 fields. Simply uncheck those four fields and continue with the export process. The four fields show **Net Tax Payment** amounts in which someone could use to figure out the State Payment amount applied to a parcel. See *Figure 9*.

The four fields have been unchecked, and will not be included in the export file.

General		Fields			
<input checked="" type="checkbox"/> 1st Half Parcel Id	<input checked="" type="checkbox"/> Span Number	<input checked="" type="checkbox"/> Waived Penalty	<input checked="" type="checkbox"/> Previous Resi Land L	<input checked="" type="checkbox"/> X Equip Comment 2	<input checked="" type="checkbox"/> Misc Field 8
<input checked="" type="checkbox"/> 2nd Half Parcel Id	<input checked="" type="checkbox"/> Code 1	<input checked="" type="checkbox"/> Send Record To State	<input checked="" type="checkbox"/> Previous Nonresi Lan	<input checked="" type="checkbox"/> X Equip Comment 3	<input checked="" type="checkbox"/> Misc Field 9
<input checked="" type="checkbox"/> Owner 1	<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> Date Record Sent To	<input checked="" type="checkbox"/> Land Use State Flag	<input checked="" type="checkbox"/> X Equip Flag	<input checked="" type="checkbox"/> Special Exemp
<input checked="" type="checkbox"/> Owner 2	<input checked="" type="checkbox"/> Owner	<input checked="" type="checkbox"/> Business Use Of Proj	<input checked="" type="checkbox"/> Grand List Value	<input checked="" type="checkbox"/> Equip Result Of Griev	<input checked="" type="checkbox"/> Homestead Sp
<input checked="" type="checkbox"/> Address 1	<input checked="" type="checkbox"/> Wood Acres	<input checked="" type="checkbox"/> Rental Use Of Proper	<input checked="" type="checkbox"/> Change Appraisal Fla	<input checked="" type="checkbox"/> Dist. Differential	<input checked="" type="checkbox"/> Lift,2snow,3b
<input checked="" type="checkbox"/> Address 2	<input checked="" type="checkbox"/> Crop Acres	<input checked="" type="checkbox"/> Business Use Of Out	<input checked="" type="checkbox"/> Prev Real Value	<input checked="" type="checkbox"/> Tax Status	<input checked="" type="checkbox"/> Old Prop #
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Pasture Acres	<input checked="" type="checkbox"/> Sole Beneficiary Of F	<input checked="" type="checkbox"/> Result Of Grievance	<input checked="" type="checkbox"/> Total Tax	<input checked="" type="checkbox"/> Old Sub #
<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Other Acres	<input checked="" type="checkbox"/> Life Estate Interest Ir	<input checked="" type="checkbox"/> Prev Equipment Value	<input checked="" type="checkbox"/> Variable Rates	<input checked="" type="checkbox"/> List Type
<input checked="" type="checkbox"/> Zip	<input checked="" type="checkbox"/> Site Acres	<input checked="" type="checkbox"/> Relative Of Farmer V	<input checked="" type="checkbox"/> Prev Inventory Value	<input type="checkbox"/> Tax Payment 1	<input checked="" type="checkbox"/> Endorse Field
<input checked="" type="checkbox"/> Location A	<input checked="" type="checkbox"/> Total Acres	<input checked="" type="checkbox"/> Multi Town Parcel	<input checked="" type="checkbox"/> X Homestead Flag	<input type="checkbox"/> Tax Payment 2	<input checked="" type="checkbox"/> Print Sequenc
<input checked="" type="checkbox"/> Location B	<input checked="" type="checkbox"/> Lease Value	<input checked="" type="checkbox"/> Date Info Last Receiv	<input checked="" type="checkbox"/> X Houseite Flag	<input type="checkbox"/> Tax Payment 3	<input checked="" type="checkbox"/> 2 (character) C
<input checked="" type="checkbox"/> Location C	<input checked="" type="checkbox"/> Real Value	<input checked="" type="checkbox"/> Homestead Value	<input checked="" type="checkbox"/> Home Result Of Grie	<input type="checkbox"/> Tax Payment 4	<input checked="" type="checkbox"/> 1 (character) C
<input checked="" type="checkbox"/> 911 Number	<input checked="" type="checkbox"/> Land Value	<input checked="" type="checkbox"/> Houseite Value	<input checked="" type="checkbox"/> Hs Result Of Grievar	<input type="checkbox"/> Bill Number	<input checked="" type="checkbox"/> Bill Reprint Ne
<input checked="" type="checkbox"/> 911 Suffix	<input checked="" type="checkbox"/> Building Value	<input checked="" type="checkbox"/> Veterans Exemption	<input checked="" type="checkbox"/> Prev Homestead Value	<input type="checkbox"/> Notes	<input checked="" type="checkbox"/> Reappraisal La
<input checked="" type="checkbox"/> 911 Street	<input checked="" type="checkbox"/> Equipment Value	<input checked="" type="checkbox"/> Non-resident Vet Exem	<input checked="" type="checkbox"/> Prev Houseite Value	<input type="checkbox"/> Misc Fee 1	<input checked="" type="checkbox"/> Reappraisal Br
<input checked="" type="checkbox"/> Tax Map	<input checked="" type="checkbox"/> Equipment Code	<input checked="" type="checkbox"/> Homestead Vet Exem	<input checked="" type="checkbox"/> X Real Comment1	<input type="checkbox"/> Misc Fee 2	<input checked="" type="checkbox"/> Reappraisal R
<input checked="" type="checkbox"/> Property Desc	<input checked="" type="checkbox"/> Inventory Value	<input checked="" type="checkbox"/> Farm Stable Exempt	<input checked="" type="checkbox"/> X Real Comment2	<input type="checkbox"/> Misc Fee 3	<input checked="" type="checkbox"/> Reappraisal H
<input checked="" type="checkbox"/> Price	<input checked="" type="checkbox"/> Contract Value	<input checked="" type="checkbox"/> Non-resident Farm St	<input checked="" type="checkbox"/> X Real Comment3	<input type="checkbox"/> Misc Fee 4	<input checked="" type="checkbox"/> Reappraisal H
<input checked="" type="checkbox"/> Price Valid	<input checked="" type="checkbox"/> Non-resident Contract	<input checked="" type="checkbox"/> Homestead Farm Sta	<input checked="" type="checkbox"/> X Home. Comment 1	<input type="checkbox"/> 1% Late Hs-131 File	<input checked="" type="checkbox"/> Last Updated
<input checked="" type="checkbox"/> Reason For Valid Or I	<input checked="" type="checkbox"/> Homestead Contract	<input checked="" type="checkbox"/> Farm Stab. Vote Date	<input checked="" type="checkbox"/> X Home. Comment 2	<input type="checkbox"/> Prior 1% Late Penalty	
<input checked="" type="checkbox"/> Last Book Recorded I	<input checked="" type="checkbox"/> Contr Voted Date	<input checked="" type="checkbox"/> Farm Stab Vote Begir	<input checked="" type="checkbox"/> X Home. Comment 3	<input type="checkbox"/> Prior Tax Amount (use	
<input checked="" type="checkbox"/> Last Page Recorded I	<input checked="" type="checkbox"/> Contr Vote Begin Date	<input checked="" type="checkbox"/> Farm Stab Vote End I	<input checked="" type="checkbox"/> X House Comment 1	<input type="checkbox"/> Amount Of Penalty W	
<input checked="" type="checkbox"/> Date Transfer Record	<input checked="" type="checkbox"/> Contr Vote End Date	<input checked="" type="checkbox"/> Farm Stab Ref #	<input checked="" type="checkbox"/> X House Comment 2	<input type="checkbox"/> Misc Field 0	
<input checked="" type="checkbox"/> Last Transfer Id	<input checked="" type="checkbox"/> Contr Ref #	<input checked="" type="checkbox"/> Farm Stab Appr. Cod	<input checked="" type="checkbox"/> X House Comment 3	<input type="checkbox"/> Misc Field 1	
<input checked="" type="checkbox"/> Last Sale Date	<input checked="" type="checkbox"/> Contr Appr. Code	<input checked="" type="checkbox"/> Bill Ed. Tax Farm Hol	<input checked="" type="checkbox"/> X Inv Comment 1	<input type="checkbox"/> Misc Field 2	
<input checked="" type="checkbox"/> Date Of Transfer Fro	<input checked="" type="checkbox"/> Bill Ed. Tax Contr Hol	<input checked="" type="checkbox"/> Land Use Acres	<input checked="" type="checkbox"/> X Inv Comment 2	<input type="checkbox"/> Misc Field 3	
<input checked="" type="checkbox"/> Transfer Misc Info 1	<input checked="" type="checkbox"/> Contr Code	<input checked="" type="checkbox"/> Land Use Value	<input checked="" type="checkbox"/> X Inv Comment 3	<input type="checkbox"/> Misc Field 4	
<input checked="" type="checkbox"/> Transfer Misc Info 2	<input checked="" type="checkbox"/> Use Homestead Val F	<input checked="" type="checkbox"/> Non-resident Landuse	<input checked="" type="checkbox"/> X Inv Flag	<input type="checkbox"/> Misc Field 5	
<input checked="" type="checkbox"/> School Code	<input checked="" type="checkbox"/> Date Homestead Dec	<input checked="" type="checkbox"/> Homestead Land Use	<input checked="" type="checkbox"/> Inv Result Of Grieva	<input type="checkbox"/> Misc Field 6	
<input checked="" type="checkbox"/> Parcel Status	<input checked="" type="checkbox"/> Date Filed If Late.	<input checked="" type="checkbox"/> Previous Land Use V.	<input checked="" type="checkbox"/> X Equip Comment 1	<input type="checkbox"/> Misc Field 7	

